

# *CSI DAILY NEWS*



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## **Turkey to Raise Both Sunflower Oil Imports and Exports in 2025/26**

Turkey is expected to increase both imports and exports of sunflower oil as domestic demand remains strong and local production continues to fall short of requirements.

According to a report from the USDA office in Ankara, Turkey's sunflower seed production in the 2026/27 season, which begins in September, is projected to rise by 25% to 1.55 million tons. The increase is expected to be supported by an expansion in planted area to 760,000 hectares and improved yields.

At the same time, the outlook for the 2025/26 marketing year points to stronger domestic demand. Sunflower seed consumption has been revised upward to nearly 2.55 million tons, reflecting expectations of increased demand for raw materials after the government reduced import duties. The measures included a tariff quota allowing imports of either 1 million tons of sunflower seed or 400,000 tons of sunflower oil at a reduced duty rate.

Despite these efforts to ease pressure on the market, sunflower oil prices in Turkey have continued to climb. Refined sunflower oil is currently sold in supermarkets at around \$1.8 per liter, roughly 30% higher than a year earlier. By the end of 2025, domestic crude sunflower oil prices reached about \$1,570 per ton, up around 30% year-on-year, while crude sunflower oil on CIF Marmara terms was priced at approximately \$1,250 per ton.

Sunflower oil remains Turkey's most widely produced, imported and consumed vegetable oil. However, the country remains heavily reliant on imports from the Black Sea region, as domestic oilseed production is insufficient to cover both internal demand and export commitments.

For 2025/26, Turkey's sunflower oil imports are forecast at around 1.3 million tons, up from the previous year. Between September and January, imports totaled nearly 370,000 tons, an increase of 8% year-on-year. Russia remained the dominant supplier with 307,000 tons, followed by Ukraine with 33,000 tons, although shipments from Ukraine were down 60% from the same period last season.

At the same time, Turkey continues to expand shipments of processed sunflower oil to international markets. Exports in 2025/26 are estimated at 1.06 million tons, around 5% above the previous year, supported by steady external demand. In the first four months of the season, from September through December, exports rose to 321,000 tons, up 11% year-on-year. Iraq, Djibouti and Syria were the leading destinations.<sup>7</sup>

## **Geopolitical Risks Redirect Regional Logistics Flows Toward Turkey**

Rising geopolitical risks are accelerating the redistribution of regional logistics flows in favor of Turkey, strengthening the country's role as a key transit hub for trade between Russia, the Middle East, Asia and Europe.

For Russian exporters, Turkey is becoming an increasingly attractive gateway to Iraq, Syria, Jordan and the Gulf countries. A more stable route is taking shape through the ports of Mersin and Iskenderun, followed by overland delivery to destination markets. At the same time, businesses continue to face elevated sanctions and compliance risks when working with Turkish intermediaries, particularly in more complex product categories.

For Russian importers, Turkey is offering additional logistics options for cargo flows from Asia and Europe, partially offsetting disruptions linked to the Red Sea. However, tighter oversight by Ankara and Turkish banks on transactions involving Russia may lead to delays and higher operating costs.

Russian transport and logistics companies also stand to benefit from the shift. Carriers have an opportunity to strengthen their position on the Russia–Turkey corridor and in multimodal supply chains linked to Turkish ports. Still, competition with Turkish operators is intensifying, while demands for greater route visibility and customer transparency continue to grow.

Against this backdrop, multimodal routes through Turkey are becoming increasingly востребованы, allowing companies to reduce delivery times to around 12–14 days while also lowering exposure to logistics disruptions.<sup>6</sup>

## **Stavropol Leads Russian Regions in Crop Insurance Payouts for 2025 Losses**

Agricultural producers in Russia's Stavropol region received 754 million rubles in insurance compensation for crop losses in 2025, making the region one of the country's largest recipients of such payments, according to the National Union of Agricultural Insurers (NSA).

The payout was the highest among Russian regions last year and ranked third nationwide in terms of total compensation for insured crop losses. Since the beginning of 2026, farmers in the region have also received at least another 99 million rubles for similar losses.

According to the NSA, drought remained the main cause of insured losses in Stavropol over the past three years, accounting for 79% of total compensation payments. Storm-related risks, including hail, strong winds and heavy rainfall, ranked second with 14%, while pest-related losses accounted for the remaining 7%.

In total, farmers in the Stavropol region received 2 billion rubles in insurance payouts under agricultural insurance policies during 2023–2025.<sup>8</sup>

## **Russia's Agricultural Export Revenue to EAEU Countries Rises 23% in 2025**

Russia increased the value of its agricultural exports to the countries of the Eurasian Economic Union (EAEU) by 23% in 2025, reaching a record level since the bloc's establishment.

According to the latest data, Russian agricultural shipments to EAEU markets totaled 12.2 million tons in 2025, while export revenue from these supplies amounted to around \$9 billion. Compared with 2024, the value of exports rose by 23%, marking the highest result recorded since 2015.

In value terms, sunflower oil was the largest agricultural export category to EAEU countries in 2025, accounting for 8% of total supplies. It was followed by chocolate confectionery products with a 7% share, flour confectionery products with 6%, pork with 5%, and sugar with 4%.

Kazakhstan remained Russia's key agricultural trading partner within the union. Supplies to the Kazakh market reached nearly \$3.8 billion, up 15% year-on-year. The largest product categories shipped to Kazakhstan were sugar, valued at more than \$340 million, chocolate confectionery products at \$300 million, and flour confectionery products at over \$259.5 million.

Exports to Belarus exceeded \$4 billion in 2025, posting a 32% increase compared with 2024. The main revenue drivers in this market were pork at around \$365 million, sunflower oil at \$344 million, and rapeseed at \$329 million.

Russian agricultural exports to Kyrgyzstan surpassed \$700 million, rising by 25% from the previous year. Sunflower oil, chocolate and flour confectionery products were among the most in-demand categories in the local market.

Supplies to Armenia are estimated at more than \$470 million in 2025. The main contributors to export revenue in this destination were wheat, chocolate confectionery products and sunflower oil.<sup>8</sup>

## **Wheat Export Duty in Russia Returns to 135.4 Rubles per Ton**

Russia will raise its export duty on wheat for the period from March 18 to 24, while keeping duties on corn and barley at zero, according to data from the Ministry of Agriculture.

The wheat export duty has been set at 135.4 rubles per ton, up from zero a week earlier. From March 12 to 17, the rate had remained at zero for the ninth consecutive week.

At the same time, export duties on corn and barley will remain unchanged at zero.

The duty rates were calculated based on updated indicative prices. For wheat, the indicative price remained unchanged at \$231.5 per ton. For barley, it declined to \$219.0 per ton from \$230.8, while for corn it edged down to \$218.3 per ton from \$218.6.

Russia introduced flexible export duties on wheat, barley and corn in 2021 as part of its grain buffer mechanism. Under the system, the duty is set at 70% of the difference between the indicative price and the base price. Indicative prices are determined using export contracts registered on the Moscow Exchange.<sup>4</sup>

## **Russia Resumes Barley Exports to Tunisia in Early 2026**

Russia resumed barley exports to Tunisia in early 2026, marking the first shipments to the market since 2024, according to data from the Agroexport center.

In January–February 2026, Russia shipped around 55,000 tons of barley to Tunisia worth approximately \$13 million.

The previous supplies to Tunisia were recorded in 2024, when Russia exported a total of 365,000 tons of barley to the country over the full calendar year, with the value of shipments exceeding \$64 million.

Overall, in the first two months of 2026, Russia exported more than 470,000 tons of barley to foreign markets, excluding deliveries to EAEU countries.<sup>5</sup>

## **Russia's Grain and Pulse Sales Drop to 67.4 Million Tons in 2025**

Russian agricultural organizations reduced sales of grain and leguminous crops in 2025, while increasing sales of oilseeds, milk and eggs, according to Rosstat data.

In 2025, agricultural enterprises sold 67.4 million tons of grain and pulses, down 13.8% from 78.3 million tons a year earlier. The decline affected most major grain crops. Wheat sales fell 14% year-on-year to 46.8 million tons, barley dropped 17.9% to 7.66 million tons, corn declined 12.8% to 7.5 million tons, and rye decreased 17.1% to 568,400 tons. Millet sales were down 19.4% to 106,800 tons, buckwheat fell 7.2% to 459,100 tons, and oats slipped 2.3% to 977,700 tons. The sharpest decline was recorded in rice, where sales dropped 30.9% to 547,800 tons.

At the same time, oilseed sales rose by 4.9% year-on-year to 18.8 million tons. However, sunflower sales declined by 3.3% to 9.8 million tons.

Among other crop products, vegetable sales edged up 0.6% to 3.54 million tons. At the same time, potato sales fell 6.8% to 2.9 million tons, fruits, berries and nuts declined 6.6% to 1.22 million tons, grape sales dropped 4.8% to 504,000 tons, and sugar beet sales slipped 0.8% to 38 million tons. Sales of fiber flax, however, surged 47.6% to 10,300 tons.

In the livestock segment, total sales of livestock and poultry in live weight remained broadly stable at 11.9 million tons, up 0.1% from 2024. Cattle sales fell 0.8% to 1.24 million tons, pig sales declined 0.9% to 5.65 million tons, while poultry sales increased 1.3% to 4.95 million tons. Sales of sheep and goats rose 10.7% to 53,400 tons.

Dairy and egg production showed stronger growth. Milk sales, in terms of established fat content, increased by 4.8% year-on-year to 20.8 million tons. Egg sales rose 7.2% to 36 billion pieces, compared with 33.6 billion a year earlier.<sup>3</sup>

## **Egypt's Share in Russian Wheat Exports Reaches Record Level**

Egypt is expected to remain one of the key destinations for Russian wheat exports, as the country continues to rank among the world's largest wheat importers and Russian supplies retain a strong competitive position.

Egypt typically imports around 11–12 million tons of wheat per season, and by the end of the current marketing year, purchases could rise to 12.7 million tons. The country traditionally sources wheat from Russia, Ukraine and EU suppliers.

Russia's share in Egypt's wheat imports has been steadily increasing and reached a record 21% in the 2024/25 season, with shipments exceeding 9.4 million tons, according to analysts at Agroexport. In the first eight months of the 2025/26 season, from July through February, Russia supplied around 6.5 million tons of wheat to Egypt and is expected to continue expanding deliveries.

According to a new report by the USDA's FAS attaché in Egypt, the country may slightly reduce wheat imports in the 2026/27 season to 12.5 million tons. However, purchasing priorities are expected to remain focused on suppliers offering the most competitive prices, favorable logistics and fast delivery.

Under these conditions, Russia is likely to maintain its leading position in the Egyptian market in the next season, supported by pricing competitiveness and logistical advantages, while continuing to play an important role in ensuring Egypt's food security.<sup>4</sup>

## **Sunflower Prices in Ukraine Continue to Rise on Higher Oil Market**

Sunflower prices in Ukraine continued to strengthen last week, supported by a faster rise in sunflower oil prices and ongoing fluctuations in the hryvnia exchange rate against the U.S. dollar.

According to the market, processors' bid prices were quoted in a relatively wide range of 28,500–30,500 UAH per ton. At the same time, effective purchase prices generally started from 29,200–29,500 UAH per ton on a CPT basis.

Meanwhile, prices for sunflower meal and cake in Ukraine's central and southern regions continued to decline amid weak demand.

Sales of sunflower meal in these regions were reported at 9,500–9,800 UAH per ton on an FCA basis. <sup>2</sup>

## **EU Increases Sunseed Imports from Argentina to Offset Earlier Processing Decline**

Argentina sharply increased sunflower seed exports in February, with stronger shipments to the European Union expected to support higher EU processing volumes in the second half of the 2025/26 marketing year, according to Oil World.

In February, Argentina's sunflower seed exports rose to 216,000 tons from 113,000 tons in January. The increase was driven mainly by shipments to Europe, particularly Bulgaria, where exports climbed from zero to 121,000 tons, and Romania, where volumes rose from 33,000 tons to 73,000 tons. Deliveries to Portugal also edged up from 20,000 tons to 21,000 tons.

Analysts expect that active imports from Argentina will help lift sunflower seed processing in the EU in the second half of the 2025/26 season, offsetting the decline seen in the first half of the marketing year.

In total, during October–February of the 2025/26 marketing year, Argentina exported nearly 430,000 tons of sunflower seed, compared with just 25,000 tons in the same period of 2024/25. Of that volume, around 290,000 tons were shipped to the EU, while 67,000 tons went to South Africa and 47,000 tons to Turkey. Additional destinations included the United States, Mexico, Chile, Brazil and Algeria.

According to analysts, Argentina's sunflower seed production in 2026 is expected to increase to 6.1–6.2 million tons from 5.2 million tons a year earlier, while exports are forecast to reach 800,000 tons. <sup>1</sup>

## **Hormuz Tensions Raise Risks for Grain and Food Importers in the Middle East**

Escalating tensions around the Strait of Hormuz are raising risks for grain and food importers across the Middle East by increasing energy, freight and insurance costs and putting additional pressure on agricultural supply chains, according to Dr. Sadar Abdul Rasheed, Risk Governance & Industrial Hedging Specialist.

Dr. Rasheed said the first and most immediate transmission channels for the crisis into agri-commodity markets are energy prices, ocean freight and marine insurance, which tend to affect food supply chains faster than foreign exchange or credit conditions. These factors directly

influence fertilizer costs, processing margins, logistics, shipping expenses and the final landed cost of imported food.

For Gulf Cooperation Council (GCC) countries, which remain heavily dependent on imported food, the situation is redefining the concept of food security. In current conditions, the key issue is no longer only the availability of food on global markets, but also the ability to secure deliveries at a predictable landed cost.

According to the expert, regional governments and buyers should focus on maintaining staple reserves, diversifying shipping routes, using more flexible procurement contracts and building adequate buffers for critical inputs such as fertilizers, fuel and packaging materials.

He also stressed that the current “war premium” seen in wheat and edible oil prices should be viewed as part of a broader logistics and cost shock. If shipping through Hormuz remains insecure, importers may face higher ocean freight, rising war-risk insurance premiums, increased bunker fuel costs, port congestion and potential demurrage charges, all of which would push up the final landed cost of grain and vegetable oils.

In addition, disruption risks could spill over into energy-linked agricultural inputs such as ammonia, urea and LPG, tightening fertilizer availability and adding further inflationary pressure across food supply chains.

Dr. Rasheed warned that ongoing stress in the Red Sea effectively creates a “two-chokepoint” scenario for regional buyers. As long as both corridors remain unstable, higher supply chain costs are likely to persist.

To reduce the impact on consumers, he recommended that governments maintain buffer stocks, use structured tendering systems and apply controlled retail pricing mechanisms where necessary. Private-sector companies, meanwhile, should maintain hedging discipline, avoid panic buying and base procurement decisions on market indicators rather than headlines.

Among the key indicators to monitor, he highlighted daily tanker transits through Hormuz, adjustments to war-risk zones, freight surcharges, port congestion, and the pace of ammonia and fertilizer shipments, which can help distinguish between short-term disruptions and longer-term structural cost inflation.<sup>1</sup>

## **Canada May Plant More Canola as Oilseed Prices Strengthen**

Canadian farmers may plant more canola in 2026 than the 8.82 million hectares previously estimated by Statistics Canada, as stronger prices and shifting input economics improve the crop’s profitability, Reuters reported.

According to a Reuters farmer survey, producers are also expected to maintain spring wheat acreage at 7.608 million hectares and expand barley plantings as fertilizer prices surge amid geopolitical tensions linked to the war with Iran.

Farmers cited the continued rise in canola prices and a search for relatively “safe” crops in an environment of unstable global demand and heightened geopolitical uncertainty.

Canada remains the world’s largest producer and exporter of canola seed and is also among the top five global wheat exporters, making any shift in planting decisions closely watched by global oilseed and grain markets.

Analysts noted that when Statistics Canada conducted its survey, canola prices were below production costs. However, at current forward prices, the crop has become profitable again, increasing the likelihood that farmers will revise their planting plans in favor of canola.

According to the Reuters survey, canola acreage could rise by an additional 150,000 to 200,000 hectares above the earlier official estimate.

Analysts also pointed to a broader increase in prices across vegetable oils and oilseeds, which is supporting stronger planting incentives.<sup>1</sup>

## **Brazil’s Wheat Area May Decline Again in 2026/27**

Brazil is expected to harvest its smallest wheat crop in five years in the 2026/27 season, as weak margins, rising input costs and competition from alternative winter crops prompt farmers to cut plantings.

According to the national crop agency Conab, Brazil’s wheat production is forecast at around 6.9 million tons, down 12.3% from the previous season and the lowest level since 2021.

A similar outlook was previously published by Safras & Mercado, which estimated the crop at 6.86 million tons. Planting in Brazil’s main wheat-producing regions is expected to begin in April, while harvesting typically starts in September. Brazil is the second-largest wheat producer in South America.

Safras & Mercado projects planted area in 2026/27 at 1.99 million hectares, down 15.5% from the previous season and nearly 40% below the level seen four years ago. Conab expects a smaller decline, forecasting wheat area at 2.32 million hectares, or about 5.2% lower year-on-year.

Analysts say the main factor behind weaker planting interest is the deteriorating relationship between wheat prices and production costs. Higher fertilizer prices, especially for nitrogen products, have sharply increased the cost of cultivation.

Weather risks are also influencing planting decisions. Farmers are increasingly concerned about the potential impact of El Niño later this year, which could bring excessive rainfall to southern Brazil and raise the risk of quality losses. High insurance costs, restricted access to credit and financial losses in recent seasons have also reduced growers’ willingness to expand wheat acreage.<sup>1</sup>

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